

## H&S Compliance Manager Enterprise – Employee HR Access

This technical newsletter describes how to use Employee Access levels to control user access to HR information in the H&S Compliance Manager Enterprise edition. This was first introduced in version 8.013.

### Access to employee information

A user login created by the System Administrator or HR Administrator gives a user access to one or more security groups. Each security group points to parts of the application the user has access to. A group that includes "Change Employee Details" allows users to view and change employee details.

Initially only the HR Administrator may view employee HR information in employee records. The HR Administrator is the employee selected in the Company setup information.

**Setup Company Information**

Company Details | H&S Options | Event Notification Server | Enterprise D

**Administrators ( receive notifications from this system )**

**System Administrator:** Paul Dawson [v]  
Receives email notifications for extraordinary address can not be resolved. Requires an e

**HR Administrator:** Christine Rene [v]  
Has access to HR information and may alloc login. Emails may be sent to HR Administrato

### Giving other employees access to HR information

Only the HR Administrator may give other users access to HR information by checking on "HR Access" in a user's login record (File / Security Employee Login Security).

**Enable Access to HR Information**

6  HR Access  
HR Administrator may check this on if user will have access to HR employee information for selected departments.

HR Access tabs give users access to additional tabs in the employee record.

### Limiting HR Access by using Employee HR Access Levels

HR access may further be restricted by defining HR access levels for each employee. Employees may have an access level from 1 (highest) to 99 (lowest). An access level of zero means the employee does not yet have an access level defined so they may not see any other person's HR information and other employees may not see theirs. The only exception is the HR Administrator who always has access to everyone's HR information.

### Enabling HR Access Levels (Enterprise edition only)

This feature may be enabled by going to Edit / Company Details / Enterprise Options and checking on "HR Employee Level Access" then saving the changes by Pressing the OK button. The HR Administrator should then exit the H&S Compliance Manager and restart it again for the change to take effect.

**HR Employee Access Levels ( HR Administrator only )**

**HR Employee Level Access:** When checked ON - HR Administrator has access to all employees HR.  
 - Users have access to other employees HR if:  
 (a) their Login specifies HR Access, and  
 (b) their Employee Access Level number is less than the other  
 (c) the Employee is in the same department, or the HR Administrator has extended access to other departments in the Login for the User.

Determines user access to HR information for other employees if HR is enabled for the application.

**H/R is Enabled**

When checked OFF - HR Administrator has access to all employees HR.  
 - Users have access to other employees HR if:  
 (a) their Login specifies HR Access, and they have access to the employee records.

### Allocating HR Access Levels to Employees

Only the HR Administrator may allocate HR access level to employees. There are two ways the HR Administrator may do this.

#### To allocate HR Employee Access levels via a table

- Select File / Security / HR Access Levels  
 (If this is disabled check that the preceding step was done, that you have exited and restarted H&S Compliance Manager, and that you are defined as the HR Administrator)

Staff HR Access Levels				
By Department / Level		By Last Name	By First Name	Job Title
Department	Level	Full Name	Job Title	Reports To
	0	Demo Employee		
Despatch	3	Steve Williams	Storeman/Despatcher	
Factory	2	Phil Finch	Factory Manager	
Factory	3	Sally Yorke	Assembler	
Factory	3	David Taylor	Assembler	
Factory	3	Sam Norris	Lathe Operator	
Factory	3	Lillian Rowe	Assembler	
Factory	4	Robert Ennis	Engineering Apprentice	
Office	0	Christine Rene	HR Manager	Paul Dawson
Office	1	Paul Dawson	Manager	
Office	2	Mary Black	Secretary	

- Double Click on an employee line and allocate the employee's access level then select the next employee.

#### Rules for allocating HR Access Level Numbers

- The HR administrator always has access to all employees HR information so does not need an access level number.
- Other employees who have HR access may:
  - Access HR information for an employee with an access number higher than their own
  - May not access any other employee's HR with an undefined access number of 0 or if their own access level is 0 (unless they are the HR administrator).

## To allocate an individual employee an HR Access level (HR Administrator only)

- From Staff / Change employee record
- Select the "Employment HR" Tab
- Change the HR Access Level



- Press OK to save the record.

## Restricting User Access to a site or selected departments

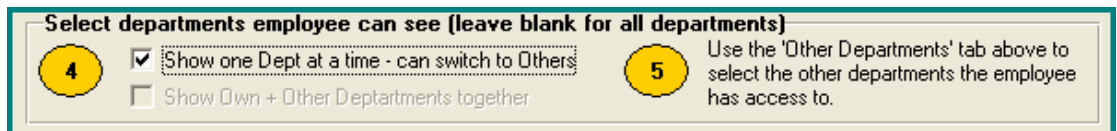
The Enterprise edition allows a user's view to be restricted to a site or selections of departments. This is defined in their login (file / Security / Employee Login).

### A user may have access to:

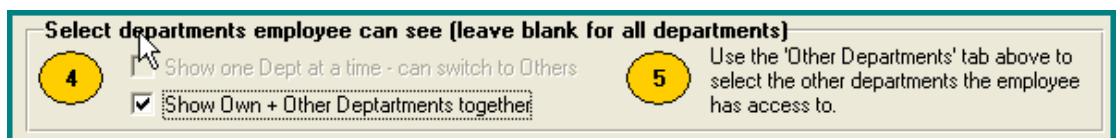
- **All departments** (default unless otherwise specified)



- **A range of departments but only one shown at a time** (switch from one to another)

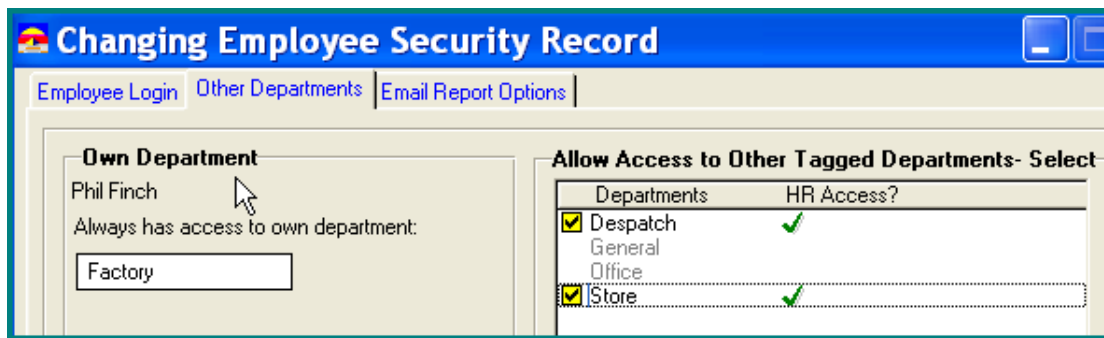


- **A range of departments and all shown together** (usual selection)



## Selecting multiple departments a user has access to

When a multiple departments are selected (in option# 4) the "Other Departments" tab is enabled and a list of departments displayed. Double click on any departments name to give the user access to that department.



Note:

The user always has access to their own department. In this tab other departments may be selected in addition to their own department.

### Selecting HR access to departments

Access to HR information in all departments is subject to both the User's HR Access Level and the Employee's HR Access Level if HR Access Level checking is enabled for the organisation.

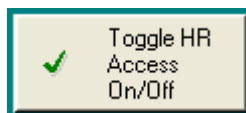
### The User's own department

- Checking "HR Access" in the user's login record allows the user to access HR information for employees in their own department that have a higher HR Access Level number than themselves.

### Other departments

To allocate user HR access to other departments the HR Administrator must

- Enable HR access to the users's own department (as above)
- Enable general access to other departments (by double clicking on the department)
- And, if access is enabled to a department, click the button "Toggle HR Access On/Off" to enable or disable HR access to the department



### In a nut shell

- HR Administrator has access to all employees' HR Information
- The HR Administrator is defined in the company setup
- Employee HR Access is enabled or disabled in the Company setup / Enterprise Options Tab
- Employees may be allocated HR Access Levels by the HR Administrator via File / Security, select the user, Change, Employee HR Access Levels (or in an employee's record)
- Users may be granted HR access to their own department from their login record by the HR Administrator.
- Users who have HR access to their own department may also be granted HR access to other departments by the HR Administrator via File / Security, select the user, Change, select Other Departments tab, and toggling HR access on/off

**For assistance or further help contact Compliance Solutions Help Desk.**